

Notes from the Quarterly Workforce Planning Coordinators' Meeting - July 28, 2014

Announcements

Workforce Planning Coordinators Survey

- Asks questions about workforce planning phase, use of our tools, and challenges and priorities in your department's workforce planning efforts.
- Similar to last year's survey but expanded and updated.
- Results are used to develop future trainings, reveal opportunities for developing/improving resources and tools.

Statewide Recruitment webpage

- New webpage dedicated to recruitment activities.
- Includes information about recruitment events and trainings.
- If you would like to be more involved with recruitment, consider joining the Statewide Recruiters Round Table. Get more information at www.staterecruiters.org.

Discussions

How does a department centralize their workforce planning efforts if their current workforce planning activities are decentralized and have no oversight?

- Assign a project leader/facilitator to take on the project for the department. This person should have the authority to keep the team moving on the workforce planning effort.
- If your department does not have a centralized unit dedicated to workforce planning, consider establishing a Workforce Planning Steering Committee.
 - Refer to information about the workforce planning steering committee from our [Developing a Workforce Plan](#) training.
- Our unit can also provide facilitation service to your department if needed. Please email us at wfp@calhr.ca.gov for more information.

Which departments have workforce plans in place now? Are those plans being implemented?

- Based on 2013 Workforce Planning Survey results from 33 departments:
 - Twenty-eight percent of departments have not established a plan.
 - Twenty-four percent of department have begun to develop a plan.
 - Fifteen percent of departments have a moderately developed plan.
 - Six percent of departments have a completed their plan.
 - Twenty-seven percent of departments have implemented their plan.
- Departments who have completed workforce plans:

- The California Public Employees' Retirement System (CalPERS) and Department of Transportation (Caltrans) have allowed us to share their plans on our [Workforce Planning Toolkit page](#).
- The California State Teachers' Retirement System (CalSTRS) workforce planning goals are written into the business plan of the department's organization to ensure the department maintains a workforce plan.
- The Board of Equalization (BOE) has been utilizing the Workforce Plan Template and is nearly done with their workforce plan. They have offered to share the plan when it is ready to be released.
- Our unit would be happy to review plans from any departments who are willing to share.
- We would like to encourage departments to use the [Workforce Plan Template](#), which can also be accessed on our [Workforce Planning Toolkit page](#).
 - If you choose to use this tool, please let our unit know about your experience so we can gather practical feedback about its functionality and create a solid tool that is truly helpful to departments.

What are some tips for implementing a workforce plan?

- Gain executive sponsorship.
- Ensure workforce plan goals are realistic and not too complex.
- Prioritize workforce plan goals.
- Establish clear ownership and accountability.
- Establish clear metrics for success.
- Create a communication plan that includes communicating the plan and individual or group responsibilities to management, employees, and other stakeholders.

How do you measure success of the workforce plan?

Build success measures, for each initiative, into the workforce plan itself (may be in an appendix). Refer to the Workforce Plan Template for the following examples:

- Action Plan section—detail each initiative and indicate which gap it aims to address.
- Action Plan Benchmarks appendix—indicate success measures.

The workforce plan is a living document that is in a continuously evolving state.

- Follow up to see whether targets were met. Adjust timelines if necessary.
- Changes/updates can be added to the original plan as appendices.

How frequently should an organization renew a workforce plan?

Be sure to review the plan annually to stay on the pulse of changes happening in the department and the environment.

Renewal of a plan depends on how often changes occur and what is needed.

Additional discussion

Collecting employee transfer data.

- Refer to A01 and A02 personnel codes, and keep track of this data manually.
- The Recruitment and Retention program, scheduled to be released in August 2014, will capture information on what brought a new employee into your department, why an employee left your department, and which department they will be going to (if applicable).
- Are other departments currently using Workforce Planning and Recruitment Unit (SWPRU) tools?
 - The new Workforce Planning Coordinators Survey captures feedback about departments' use of SWPRU tools and resources. Our unit will share the survey results when they are available.

Suggested training topics

- Computer lab-based workshop on collecting and analyzing workforce planning data

Contact the Statewide Workforce Planning and Recruitment Unit

- Let us know if you have questions, if you are thinking about facilitating a meeting, or if you have ideas for training workshops in the future.
- Email us at wfp@calhr.ca.gov, or call us at 916-322-0742.